

SharePoint

EOTA Beginners Survival Guide



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Recommended Online SharePoint 2010 Tutorials

For DIY help with SharePoint go to: “Help using SharePoint”

Recommended Books

SharePoint 2010 for Dummies-Book, eBook or PDF
(Available at Walmart, eBay and Amazon.com)

Microsoft SharePoint 2010 Quick Steps-Book, eBook or PDF
(Available at Walmart, eBay and Amazon.com)

Other Resources

There are *many* other DIY resources available using
Google.com and Microsoft.com

Your Browser and SharePoint:

In order to optimize your system for using SharePoint 2010, please follow the steps below:

▸ Navigate to:

Tools>Internet Options>Advanced

Select Enable Third Party Browser Extensions

Select Use SSL 3.0

▸ Navigate to:

Tools>Internet Options>Security>Trusted Sites>Sites

Add the URL below to your Trusted Sites list-

<https://sp.eota.energy.gov/sites/firstresponder/default.aspx>

PLEASE NOTE: This SharePoint site is best viewed in IE

- What is SharePoint?
- Why use SharePoint?

SharePoint is a collaboration tool widely gaining popularity among businesses and organizations because of its familiar interface (web browser) and customizable web parts (lists, libraries, calendars, discussion forums), allowing users to improve business processes for everything from small projects to an overall view of the efficiency of business/organizational practices.

The features of SharePoint 2010 help your company or organization quickly respond to changing business needs. Using SharePoint 2010, your teams have the opportunity to share ideas and expertise, create custom solutions for specific needs, find productive solutions and make intelligent decisions.

Empower individuals and the organization as a whole, sharing important information with the right people, boosting productivity and innovation.

The SharePoint Dashboard



1. Site Actions
2. Navigate up button
3. Ribbon tabs
4. Horizontal navigation bar
5. User menu
6. Quick Link Item
7. Quick Launch vertical bar

SharePoint Components

...called Web Parts, are easily customizable using metadata and can help you manage your projects, organize important information, and communicate effectively.

Web parts provide the means for you to add your own custom elements to a page. Most commonly used web parts are lists and libraries.

Web Part	Definition
List	Lists are a data repository that can hold columns of data and/or documents
Library	A specialized form of SharePoint list that is used to store files and content types rather than items
Calendar	Track appointments, meetings and the resources used displayed with fully customizable views
Discussion Forums	Provides a space to discuss important topics with team/project members

Lists

SharePoint Lists provide a central place to share information and for storage management.

A SharePoint list is similar to an Excel worksheet, with rows and columns and the ability to do math formulas in the intersecting cells.

A few examples of relevant List templates include:

- **Calendar** for meetings and other events
- **Reports** for an index and repository for reports
- **Status** to track the accomplishment of goals
- **Tasks** to track phases, goals

Creating a List

In order to assure that the list you create does what it is intended to do, begin by asking these questions:

1. What is the purpose of the list?
2. What fields are required?
3. What types of views are necessary?
4. Who is going to use/see the list?
5. Who will be maintaining the list, and how?
6. What is the 'life' of the list?

Adding a List Item

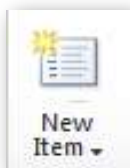
You can add an item to a list either by clicking on



located at the bottom of the list

OR

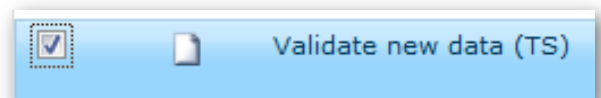
By selecting



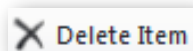
from the Items Tab under **List Tools** in the Ribbon Tabs

Deleting a List Item

You can also delete an item by selecting the item



Then selecting



Libraries

SharePoint libraries play an important role in the sharing of important information with your team.

Version control and **Check In/Check Out** work hand-in-hand within SharePoint libraries. While version control automatically tracks minor and major versions of every document uploaded (if the option is selected for that library), Check Out makes sure that only one person can edit and save changes to a document at one time. If a document is checked out by anyone, others can still view the same document as a 'read only' but will not be able to see the changes until the document is checked in by the editor.

Versions work like this:

- **Minor (draft) version:** 0.1, 0.2, 0.3...
- **Major (final) version:** 1.0, 2.0, 3.0...

When someone wants to edit a document, you **MUST** select **Check Out** in order for the document to become editable. You can also choose **Read Only** if you only want to review the document without making any changes.

When a document is uploaded to the library for the first time, SharePoint automatically counts it as version 0.1 (draft version). When editing a document, you must first choose Check Out. As changes are made, anyone who 'touches' the document from SharePoint has the following choices when the document is checked back in:

- Discard Check Out (No saved changes and version number stays the same)
- Choose major or minor version

NOTE: It is good practice to make note of the version number before you make any changes or open the document. The First Responder site does not have the version control and mandatory Check Out on every library. Ask your site administrator to incorporate these options if you feel they are necessary.

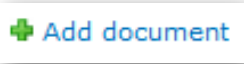
Libraries

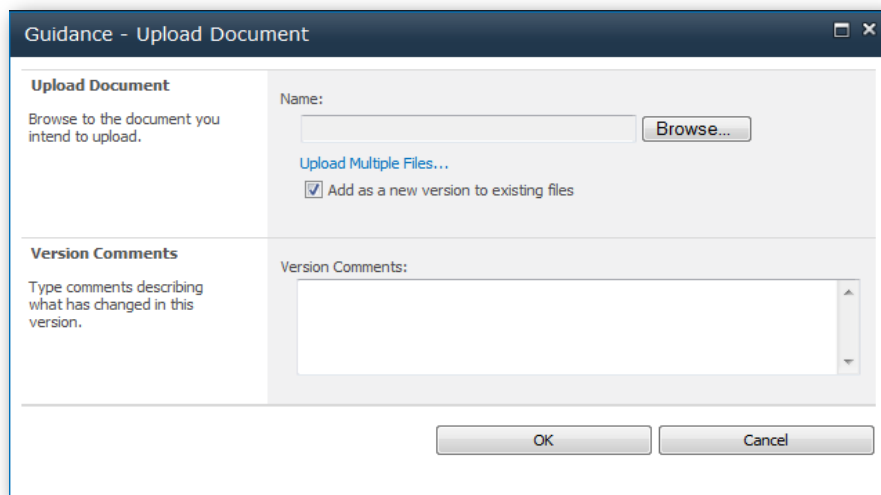
All types of Microsoft documents can be stored in a SharePoint library including:

- Excel spreadsheets
- Word documents
- PowerPoint presentations
- PDFs
- Media (Video and photos)

Adding documents to a library

To add a document:

1. Select 
2. Browse for the document you want to upload, then select OK:



Editing a document

1. Click on the document title, select Edit when prompted
2. Select **Check Out** and **Edit**. A green arrow will appear on the PowerPoint icon to the left of the title




Calendars

SharePoint calendars provide

A SharePoint calendar is actually a list, but with a specifically formatted view. To see the calendar as a list, a list view must be created and available for the calendar itself.

Adding a calendar event

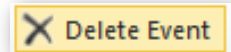
You can add an event to a calendar either by clicking on  located at the bottom of the calendar day when you mouse over or click on the day you want to schedule an event for.

OR

By selecting  from the Events Tab under **Calendar Tools**

Deleting a calendar event

To delete a calendar event click once on the event itself, then select from the Events Tab under **Calendar Tools**



Discussion Boards

Items can be added to discussion board the same way that items are added to lists and calendars.

Alerts

Alerts can be added to a list, library, calendar or discussion board; as well as the individual items listed in any of those parts.

To Add an Alert to any web part

1. In the Tool Ribbon, depending on what web part you have chosen to set an alert on-select either the (list, library, calendar) tab.

2. Select



3. Select Manage my Alerts, then select Add Alert
4. Under 'Choose a List or Document Library', choose which item you want to place to alert on
5. Select 'Next'
6. Fill out the necessary information for the alert
7. Select **OK**

NOTE: A word of extreme caution when creating alerts for others. In the case of setting an alert on a library where a high volume of items are added, it is VERY possible to also receive a high volume of emails that those items have been added to the library!

When creating an alert for yourself or others, take a moment to look at the choices you have for setting the alert and think about how that will affect the overall process.

About Workflows

The workflow feature in Microsoft SharePoint 2010 helps automate business processes and provides consistency in the way those business processes are run. Fundamentally, a workflow consists of two things: the forms that a workflow uses to interact with its users, and the logic that defines the workflow's behavior.

Benefits of using workflows

The primary benefits of using workflows are facilitation of established business processes and improvement of team collaboration. These business processes require the active participation of information workers to satisfy tasks that contribute to their workgroup's decisions or deliverables. In SharePoint 2010, these same business processes are implemented and managed using workflows. When a site user starts a workflow on a document or task, the user might have the option to further customize the workflow by specifying the list of participants, a due date, and specific task instructions.

Automating business processes

The most important processes in many organizations depend on people. Workflows can improve how that process functions; increasing its efficiency, automating notifications previously (and manually) completed using email, and reducing the error rate. Many processes can benefit from automated support for human interactions. The following is a relevant example for the First Responder SharePoint site:

Considering the approval of any important document, a common aspect of human-oriented business processes is the requirement to get approval from multiple participants. What is being approved can vary widely, ranging from a Document Set of Microsoft PowerPoint documents consisting of three training modules, to a list meant to track major projects. In any case, various people must review the document, indicate approval or rejection, and finally the appropriate personnel involved notified that all assigned tasks are completed.

About Workflows

Workflows improve collaboration

Workflows help organizations follow established, consistent business process practices. Workflows also increase organizational efficiency and productivity through management of the tasks and steps involved in those business processes. This enables the people who perform these tasks to concentrate on performing the work *instead of* on the work process itself.

Predefined Workflows

The **Collect Feedback** workflow routes an item (ex. Document or document set) to a group of reviewers for feedback. When reviewers provide feedback, that information is compiled and sent to the person who initiated the workflow. The Collect Feedback workflow is associated with the content types documents and document sets.

An **Approval** workflow routes an item to a group of people for approval. The Approval workflow is also associated with the content types documents and document sets. Each stage of an approval can have its own behavior-for example-the first group of approvers (the first 'stage') can review in serial approval order (one at a time, sequentially), and the second group (second stage) of approvers can complete their review at the same time (or in 'parallel').

A **Disposition Approval** workflow manages document expiration and retention by letting participants to decide whether to keep or delete expired documents. The Disposition Approval workflow supports record management processes.

The **Three-state** workflow is designed to track the status of a LIST item through three different states, and through two transitions between the states (Essentially Active, Resolved, and Closed. Please note that this workflow is only supported on SharePoint lists, not libraries.